Mortgage Application

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Overview

Thoroughly documenting a customer's details is critical with processes as complex as mortgage applications. This form has over 230 fields, taking the applicant through a series of questions about their financial circumstances. Data is categorised in an ordered fashion through sections of the form; such as "Address history" and "Employment and Income details".
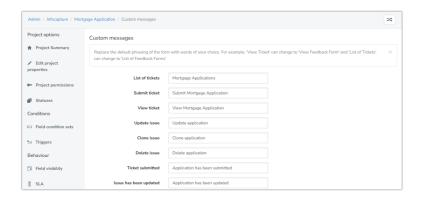
Additional features

Show/hide Field Permissions: Many of the form's fields will not be relevant for the applicant except under certain circumstances. For this reason, many of the fields remain hidden until certain conditions are met.

In the example seen here, if the applicant has selected 'yes' to a valuation, then the field *'Do you wish to arrange a more comprehensive survey'* is then allowed to appear.

Field condition set	All		Applicants		Underwriters		Admin		Submitter of ticket		Ticket handler		
	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	
Default (Always)	Mixed	Mixed	Deny	Deny	Deny	Deny	Deny	Deny	Not set	Not set	Not set	Not set	
Valuation = Yes	Mixed	Mixed	Allow	Allow	Allow	Allow	Allow	Allow	Not set	Not set	Not set	Not set	

Head to the *Field Visibility* tab in the form once imported onto your site to see the full list of rules in place.

Custom messages: The use of phrases like 'ticket' might not suit as well as 'application', so we have used the *Custom Messages* area to change the wording whenever it appears.

Created on 2 February 2018 by Hannah Door. Last modified on 30 November 2023

Tags: form templates, infocapture, Form, mortgage